Fermilab Records Management Project

Background Briefing

The Fermilab RM Program

- Fermilab had an existing Records Program
- DOE Quality Review in 2006
- Problems:
  - It was not centralized, Lab Records Administrator only knew about off-site records
  - It did not cover electronic records
- Solution:
  - This is where we need your help.

DOE Records Management

- Fermilab Prime Contract states that <u>all records</u> at Fermilab must be managed according to the DOE Order on Records.

- DOE O 243.1: Records must be managed according to the guidelines and schedules on the DOE CIO Homepage.

- Contract → O 243.1 → DOE RM homepage

What is a Record?

- <u>Records</u> are all documents, regardless of physical form, made or received by an organization in connection with the business of the organization that are deemed worthy of preservation for their documentary or informational value *following specific definitions and examples that can be found in the Fermilab Records Management Handbook*.

How to Manage Records

- Retention Schedules: tell how long a document should be kept once you no longer need it for day-to-day business (e.g. a receipt, technical drawings).

- Disposition: what you do with a record after retention schedule ends. Usually destroy after checking it is no longer needed.

- Goal: to clearly and <u>efficiently</u> document how Fermilab does business in compliance with all applicable DOE requirements.

Updating the FRMP

- Director appointed COO to this project.

- COO formed a Management Team (MT) to lead the project.

- MT has an approved Charter for this project.

- MT will develop drafts of:

  ☑Policy *(statement of goals and responsibilities)*

  ☑Handbook *(how the Policy will be carried out)*

  ❑Implementation Plan *(how to roll out the Program)*

Role of Divisions and Sections

- Records Advisory Council member represents your Division's/Section's interests.

- Provide input and feedback to Management Team (MT) on the Policy, Program and Implementation plan.

- Departments create "File Plan" of the types of records you have and what electronic systems store your records.

Further Information

- http://bss.fnal.gov/records
- Kathryn Duerr,
  - kadnz@fnal.gov,
  - x5693